

## Item 1 Cover Page: William D. Perryman

William D. Perryman  
12221 Merit Dr. Ste 1660  
Dallas, TX 75251  
972-770-4800  
CRD# 1222746

This brochure supplement provides information about William D. Perryman that supplements the Perryman Financial Advisory, Inc. brochure. You should have received a copy of that brochure. Please contact William D. Perryman, President, if you did not receive Perryman Financial Advisory, Inc.'s brochure or if you have any questions about the contents of this supplement.

Additional information about William D. Perryman is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

Dated: March 18, 2026

## Item 2 Educational Background and Business Experience

### Education History:

William Delyn Perryman, born in 1951, graduated from the Southwestern Oklahoma State University in Weatherford, Oklahoma and received a Bachelor of Science degree ("B.S.") in accounting.

### Professional Licenses:

William D. Perryman has a Certified Financial Planner ("CFP") professional designation. The Certified Financial Planner™, CFP® and federally registered CFP (with flame design) marks (collectively, the "CFP® marks") are professional certification marks granted in the United States by Certified Financial Planner Board of Standards, Inc. ("CFP Board").

The CFP® certification is a voluntary certification; no federal or state law or regulation requires financial planners to hold CFP® certification. It is recognized in the United States and a number of other countries for its (1) high standard of professional education; (2) stringent code of conduct and standards of practice; and (3) ethical requirements that govern professional engagements with clients. Currently, more than 62,000 individuals have obtained CFP® certification in the United States.

To attain the right to use the CFP® marks, an individual must satisfactorily fulfill the following requirements:

- Education – Complete an advanced college-level course of study addressing the financial planning subject areas that CFP Board's studies have determined as necessary for the competent and professional delivery of financial planning services, and attain a Bachelor's Degree from a regionally accredited United States college or university (or its equivalent from a foreign university). CFP Board's financial planning subject areas include insurance planning and risk management, employee benefits planning, investment planning, income tax planning, retirement planning, and estate planning.

- Examination – Pass the comprehensive CFP® Certification Examination. The examination, administered in 10 hours over a two-day period, includes case studies and client scenarios designed to test one's ability to correctly diagnose financial planning issues and apply one's knowledge of financial planning to real world circumstances.
- Experience – Complete at least three years of full-time financial planning-related experience (or the equivalent, measured as 2,000 hours per year); and
- Ethics – Agree to be bound by CFP Board's Standards of Professional Conduct, a set of documents outlining the ethical and practice standards for CFP® professionals:  
Individuals who become certified must complete the following ongoing education and ethics requirements in order to maintain the right to continue to use the CFP® marks:
  - Continuing Education – Complete 30 hours of continuing education hours every two years, including two hours on the Code of Ethics and other parts of the Standards of Professional Conduct, to maintain competence and keep up with developments in the financial planning field; and
  - Ethics – Renew an agreement to be bound by the Standards of Professional Conduct. The Standards prominently require that CFP® professionals provide financial planning services at a fiduciary standard of care. This means CFP® professionals must provide financial planning services in the best interests of their clients.

CFP® professionals who fail to comply with the above standards and requirements may be subject to the CFP Board's enforcement process, which could result in suspension or permanent revocation of their CFP® certification.

William D. Perryman is a Certified Public Accountant ("CPA"). The Certified Public Accountant (CPA) designation is a credential that attests to your in-depth knowledge of accounting principles and practices, including applicable laws and regulations. Many holders of the CPA in private practice devote their time to preparing and filing tax returns, both business and individual, many members of the general public erroneously assume that this is the major focus of the profession.

Earning a CPA: You are required to pass an exam and fulfill continuing professional education (CPE) requirements. Most states have their own boards of accounting (also known as boards of accountancy) that regulate the profession and the awarding of the CPA license. Qualifying to practice in one state may not automatically allow you to practice in another.

William D. Perryman has a General Lines, Life, Accident, Health, and HMO Insurance license. The Insurance license allows him to sell health, dental, disability and traditional life insurance products. Insurance licenses are issued by all states. Each insurance department establishes the required qualifications for this license.

#### General Requirements:

- An individual applying for a Texas insurance license must be at least 18 years of age.
- Applicants are not required to be sponsored to pursue their license.
- Applicants must submit fingerprints as part of the license application.
- Texas has no pre-licensing education requirement unless a 90-day temporary license is desired. To obtain a 90-day temporary license, candidates must complete 40 hours of pre-licensing education.
- Candidates must apply for licensure within 12 months from receiving a passing grade on the examination.

## Business Background:

Employer	Start Date	End Date	Position
Perryman Financial Advisory, Inc.	October, 1994	Current	President, Treasurer and Secretary
Perryman Securities, Inc.	June, 2001	Current	President and Registered Representative, FINOP

### Item 3 Disciplinary Information

William D. Perryman does not have any disciplinary information to disclose.

A full report that reflects the professional background, business practices, and conduct of our advisory agents is available through the Financial Industry Regulatory Authority's (FINRA) BrokerCheck system link at [www.finra.org/brokercheck](http://www.finra.org/brokercheck) or you may request disclosable information under BrokerCheck by calling (800) 289-9999, a toll-free hotline operated by FINRA.

You may also access a full report of our advisory agents through the IAPD link at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov). Should you have any technical difficulties with this link, you can call 240-386-4848 for further assistance.

The information that appears on these websites is collected from individual investment adviser representatives, investment adviser firm(s), and/or securities regulator(s) as part of the securities industry's registration and licensing process.

### Item 4 Other Business Activities

William D. Perryman is also a registered representative of Perryman Securities, Inc. (Member FINRA/SIPC). In this capacity, he may sell securities through Perryman Securities, Inc. and receive normal and customary commissions as a result of such purchases and sales. This presents a conflict of interest to the extent that he recommends that you invest in a security, which results in a commission being paid to him.

William D. Perryman has a Group I Insurance license and provides insurance sales through Perryman Financial Advisory, Inc. William D. Perryman will seek out the products of any company, agency or brokerage that may have products fitting our client's needs. William D. Perryman spends less than 5% of his time on insurance sales. William D. Perryman receives commissions based on the sales of these insurance products. This presents a conflict of interest to the extent that he recommends the purchase of an insurance product, which results in a commission being paid to him as an insurance agent.

William D. Perryman is on the District 6 Grievance Committee of the State Bar of Texas. No compensation is received, and he spends approximately four to six hours per month on this activity.

### Item 5 Additional Compensation

William D. Perryman does not receive any economic benefits for providing advisory services from someone who is not a client of Perryman Financial Advisory, Inc., other than what is disclosed in this form.

## Item 6 Supervision

All new accounts undergo careful analysis and review as to appropriateness of assets held and asset allocation, and are compared to the investment objectives stated by you. After an account has been approved for a specific investment program, the Chief Compliance Officer will monitor the trading activities in the account to ensure that the securities purchased or sold are consistent with your investment objectives.

The Chief Compliance Officer will review the activity in each account at least quarterly to determine if the account has been managed in a manner consistent with your investment objectives and shall discuss any questionable activities in any account with you. The Chief Compliance Officer will also look for any evidence of excessive trading or conflicts of interest between the portfolio manager and you.

Our Firm has established written policies and procedures that it will utilize to supervise. In addition, a Code of Ethics has been adopted, which we have agreed to follow and comply with.

The confidence and trust placed in our Firm and its employees is something we value and endeavor to protect.

The Supervisor for William D. Perryman is James S. Perryman, Chief Compliance Officer. James S. Perryman can be reached at 972-770-4800 should you have any additional questions or concerns.

## Item 7 Requirements for State Registered Advisers

Not applicable.

## Item 1 Cover Page: Nancy K. Phillips

Nancy K. Phillips  
12221 Merit Dr. Ste 1660  
Dallas, TX 75251  
972-770-4800  
CRD# 4519607

This brochure supplement provides information about Nancy K. Phillips that supplements the Perryman Financial Advisory, Inc. brochure. You should have received a copy of that brochure. Please contact William D. Perryman, President, if you did not receive Perryman Financial Advisory, Inc.'s brochure or if you have any questions about the contents of this supplement.

Additional information about Nancy K. Phillips is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

Dated: March 18, 2026

## Item 2 Educational Background and Business Experience

### Education History:

Nancy Kay Phillips, born in 1955, attended the University of Texas in Arlington, Texas and received a Bachelor of Business Administration ("BBA") degree in accounting. Nancy also attended Baylor University in Waco, Texas, and received her Master of Professional Accountancy ("MPA") in taxation.

### Professional Licenses:

Nancy K. Phillips has a Certified Financial Planner ("CFP") professional designation. The Certified Financial Planner™, CFP® and federally registered CFP (with flame design) marks (collectively, the "CFP® marks") are professional certification marks granted in the United States by Certified Financial Planner Board of Standards, Inc. ("CFP Board").

The CFP® certification is a voluntary certification; no federal or state law or regulation requires financial planners to hold CFP® certification. It is recognized in the United States and a number of other countries for its (1) high standard of professional education; (2) stringent code of conduct and standards of practice; and (3) ethical requirements that govern professional engagements with clients. Currently, more than 62,000 individuals have obtained CFP® certification in the United States.

To attain the right to use the CFP® marks, an individual must satisfactorily fulfill the following requirements:

- Education – Complete an advanced college-level course of study addressing the financial planning subject areas that CFP Board's studies have determined as necessary for the competent and professional delivery of financial planning services, and attain a Bachelor's Degree from a regionally accredited United States college or university (or its equivalent from a foreign university). CFP Board's financial planning subject areas include insurance planning and risk management, employee benefits planning, investment planning, income tax planning, retirement planning, and estate planning.

- Examination – Pass the comprehensive CFP® Certification Examination. The examination, administered in 10 hours over a two-day period, includes case studies and client scenarios designed to test one's ability to correctly diagnose financial planning issues and apply one's knowledge of financial planning to real-world circumstances.
- Experience – Complete at least three years of full-time financial planning-related experience (or the equivalent, measured as 2,000 hours per year); and
- Ethics – Agree to be bound by CFP Board's Standards of Professional Conduct, a set of documents outlining the ethical and practice standards for CFP® professionals:  
Individuals who become certified must complete the following ongoing education and ethics requirements to maintain the right to continue to use the CFP® marks:
  - Continuing Education – Complete 30 hours of continuing education hours every two years, including two hours on the Code of Ethics and other parts of the Standards of Professional Conduct, to maintain competence and keep up with developments in the financial planning field; and
  - Ethics – Renew an agreement to be bound by the Standards of Professional Conduct. The Standards prominently require that CFP® professionals provide financial planning services at a fiduciary standard of care. This means CFP® professionals must provide financial planning services in the best interests of their clients.

CFP® professionals who fail to comply with the above standards and requirements may be subject to the CFP Board's enforcement process, which could result in suspension or permanent revocation of their CFP® certification.

Nancy K. Phillips is a Certified Public Accountant ("CPA"). The Certified Public Accountant (CPA) designation is a credential that attests to your in-depth knowledge of accounting principles and practices, including applicable laws and regulations. Many holders of the CPA in private practice devote their time to preparing and filing tax returns, both business and individual, many members of the general public erroneously assume that this is the major focus of the profession.

Earning a CPA: You are required to pass an exam and fulfill continuing professional education (CPE) requirements. Most states have their own boards of accounting (also known as boards of accountancy) that regulate the profession and the awarding of the CPA license. Qualifying to practice in one state may not automatically allow you to practice in another.

Nancy K. Phillips has a General Lines, Life, Accident, Health, and HMO Insurance license. The Insurance license allows her to sell health, dental, disability, and traditional life insurance products. Insurance licenses are issued by all states. Each insurance department establishes the required qualifications for this license.

#### General Requirements:

- An individual applying for a Texas insurance license must be at least 18 years of age.
- Applicants are not required to be sponsored to pursue their license.
- Applicants must submit fingerprints as part of the license application.
- Texas has no pre-licensing education requirement unless a 90-day temporary license is desired. To obtain a 90-day temporary license, candidates must complete 40 hours of pre-licensing education.
- Candidates must apply for licensure within 12 months from receiving a passing grade on the examination.

## Business Background:

Employer	Start Date	End Date	Position
<b>Perryman Financial Advisory, Inc.</b>	September, 2003	Current	Investment Adviser Agent/Solicitor
<b>Perryman Securities, Inc.</b>	September, 2003	February, 2026	Registered Representative
<b>Nancy K. Phillips, PC</b>	October, 1985	Current	Accounting/Tax, CPA

### Item 3 Disciplinary Information

Nancy K. Phillips does not have any disciplinary information to disclose.

A full report that reflects the professional background, business practices, and conduct of our advisory agents is available through the Financial Industry Regulatory Authority's (FINRA) BrokerCheck system link at [www.finra.org/brokercheck](http://www.finra.org/brokercheck) or you may request disclosable information under BrokerCheck by calling (800) 289-9999, a toll-free hotline operated by FINRA.

You may also access a full report of our advisory agents through the IAPD link at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov). Should you have any technical difficulties with this link, you can call 240-386-4848 for further assistance.

The information that appears on these websites is collected from individual investment adviser representatives, investment adviser firm(s), and/or securities regulator(s) as part of the securities industry's registration and licensing process.

### Item 4 Other Business Activities

Nancy K. Phillips has a Group I Insurance license and provides insurance sales through Perryman Financial Advisory, Inc., or other various insurance companies. Nancy K. Phillips will seek the products of any company, agency or brokerage firms that may have products fitting our client's needs. Nancy K. Phillips spends less than 5% of her time in insurance sales. Nancy K. Phillips receives commissions based on the sales of these insurance products. This presents a conflict of interest to the extent that she recommends the purchase of an insurance product, which results in a commission being paid to her as an insurance agent.

Nancy K. Phillips is a Certified Public Accountant ("CPA") and owns a small boutique certified public accounting firm in Dallas, Texas since 1985. Her company caters to high-net-worth family groups and small business owners. Her firm consists of well-trained professionals who help to give overall tax and financial advice. Her specialties include complex income tax preparation and planning, helping train your staff on accounting software, estate and trust tax work, and financial planning. Nancy K. Phillips spends 97% of her time in her accounting firm. More information about Nancy K. Phillips accounting firm can be found at [www.nkphillipscpa.com](http://www.nkphillipscpa.com).

Nancy K. Phillips is a 50% owner of Peak Properties Inc., the General Partner of Peak Properties, LP. Nancy is also a Partner in Peak Property, LP, a rental properties entity and spends less than ten hours per month on this activity.

Nancy is also a sole proprietor who sells bead necklaces and earrings.

#### **Item 5 Additional Compensation**

Nancy K. Phillips does not receive any economic benefits for providing advisory services from someone who is not a client of Perryman Financial Advisory, Inc, other than what is disclosed in this form.

#### **Item 6 Supervision**

All new accounts undergo careful analysis and review as to appropriateness of assets held and asset allocation, and are compared to the investment objectives stated by you. After an account has been approved for a specific investment program, the Chief Compliance Officer will monitor the trading activities in the account to ensure that the securities purchased or sold are consistent with your investment objectives.

The Chief Compliance Officer will review the activity in each account at least quarterly to determine if the account has been managed in a manner consistent with your investment objectives and shall discuss any questionable activities in any account with you. The Chief Compliance Officer will also look for any evidence of excessive trading or conflicts of interest between the portfolio manager and you.

Our Firm has established written policies and procedures that it will utilize to supervise. In addition, a Code of Ethics has been adopted, which we have agreed to follow.

The confidence and trust placed in our Firm and its employees is something we value and endeavor to protect.

The Supervisor for Nancy K. Phillips is William D. Perryman, President. William D. Perryman can be reached at 972-770-4800 should you have any additional questions or concerns.

#### **Item 7 Requirements for State Registered Advisers**

Not applicable.

## Item 1 Cover Page: James S. Perryman

James S. Perryman  
12221 Merit Dr. Ste 1660  
Dallas, TX 75251  
972-770-4800  
CRD# 4499887

This brochure supplement provides information about James S. Perryman that supplements the Perryman Financial Advisory, Inc. brochure. You should have received a copy of that brochure. Please contact William D. Perryman, President, if you did not receive Perryman Financial Advisory, Inc.'s brochure or if you have any questions about the contents of this supplement.

Additional information about James S. Perryman is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

Dated: March 18, 2026

## Item 2 Educational Background and Business Experience

### Education History:

James Stephen Perryman, born 1972, graduated from the Abilene Christian University in Abilene, Texas and received a Bachelor of Business Administration degree ("BBA") in finance.

### Professional Licenses:

James S. Perryman has a Certified Financial Planner ("CFP") professional designation. The Certified Financial Planner™, CFP® and federally registered CFP (with flame design) marks (collectively, the "CFP® marks") are professional certification marks granted in the United States by Certified Financial Planner Board of Standards, Inc. ("CFP Board").

The CFP® certification is a voluntary certification; no federal or state law or regulation requires financial planners to hold CFP® certification. It is recognized in the United States and a number of other countries for its (1) high standard of professional education; (2) stringent code of conduct and standards of practice; and (3) ethical requirements that govern professional engagements with clients. Currently, more than 62,000 individuals have obtained CFP® certification in the United States.

To attain the right to use the CFP® marks, an individual must satisfactorily fulfill the following requirements:

- Education – Complete an advanced college-level course of study addressing the financial planning subject areas that CFP Board's studies have determined as necessary for the competent and professional delivery of financial planning services, and attain a Bachelor's Degree from a regionally accredited United States college or university (or its equivalent from a foreign university). CFP Board's financial planning subject areas include insurance planning and risk management, employee benefits planning, investment planning, income tax planning, retirement planning, and estate planning.
- Examination – Pass the comprehensive CFP® Certification Examination. The examination, administered in 10 hours over a two-day period, includes case studies and client scenarios designed

to test one's ability to correctly diagnose financial planning issues and apply one's knowledge of financial planning to real-world circumstances.

- Experience – Complete at least three years of full-time financial planning-related experience (or the equivalent, measured as 2,000 hours per year); and
- Ethics – Agree to be bound by CFP Board's Standards of Professional Conduct, a set of documents outlining the ethical and practice standards for CFP® professionals.

Individuals who become certified must complete the following ongoing education and ethics requirements to maintain the right to continue to use the CFP® marks:

- Continuing Education – Complete 30 hours of continuing education hours every two years, including two hours on the Code of Ethics and other parts of the Standards of Professional Conduct, to maintain competence and keep up with developments in the financial planning field; and
- Ethics – Renew an agreement to be bound by the Standards of Professional Conduct. The Standards prominently require that CFP® professionals provide financial planning services at a fiduciary standard of care. This means CFP® professionals must provide financial planning services in the best interests of their clients.

CFP® professionals who fail to comply with the above standards and requirements may be subject to the CFP Board's enforcement process, which could result in suspension or permanent revocation of their CFP® certification.

James S. Perryman has a General Lines, Life, Accident, Health, and HMO Insurance license.

The Insurance license allows him to sell health, dental, disability, and traditional life insurance products. Insurance licenses are issued by all states. Each insurance department establishes the required qualifications for this license.

General Requirements:

- An individual applying for a Texas insurance license must be at least 18 years of age.
- Applicants are not required to be sponsored to pursue their license.
- Applicants must submit fingerprints as part of the license application.
- Texas has no pre-licensing education requirement unless a 90-day temporary license is desired. To obtain a 90-day temporary license, candidates must complete 40 hours of pre-licensing education.
- Candidates must apply for licensure within 12 months from receiving a passing grade on the examination.

Business Background:

Employer	Start Date	End Date	Position
<b>Perryman Financial Advisory, Inc.</b>	May, 2001	Current	Chief Compliance Officer
<b>Perryman Securities, Inc.</b>	February, 2002	Current	Registered Representative and Chief Compliance Officer

**Item 3      Disciplinary Information**

James S. Perryman has no disciplinary information to disclose.

A full report that reflects the professional background, business practices, and conduct of our advisory agents is available through the Financial Industry Regulatory Authority's (FINRA) BrokerCheck

system link at [www.finra.org/brokercheck](http://www.finra.org/brokercheck) or you may request disclosable information under BrokerCheck by calling (800) 289-9999, a toll-free hotline operated by FINRA.

You may also access a full report of our advisory agents through the IAPD link at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov). Should you have any technical difficulties with this link, you can call 240-386-4848 for further assistance.

The information that appears on these websites is collected from individual investment adviser representatives, investment adviser firm(s), and/or securities regulator(s) as part of the securities industry's registration and licensing process.

#### **Item 4 Other Business Activities**

James S. Perryman is also a registered representative of Perryman Securities, Inc. (Member FINRA/SIPC). In this capacity, he may sell securities through Perryman Securities, Inc. and receive normal and customary commissions as a result of such purchases and sales. This presents a conflict of interest to the extent that he recommends that you invest in a security which results in a commission being paid to him.

James S. Perryman has a Group I Insurance license and provides insurance sales through Perryman Financial Advisory, Inc. James S. Perryman will seek out the products of any company, agency or brokerage that may have products fitting our client's needs. James S. Perryman spends less than 5% of his time on insurance sales. James S. Perryman receives commissions based on the sales of these insurance products. This presents a conflict of interest to the extent that he recommends the purchase of an insurance product, which results in a commission being paid to him as an insurance agent.

Jimmy S. Perryman is an investment committee member for the Ronald McDonald House of Dallas, a non-profit that provides housing to families of sick children, and conducts oversight of the outside investment manager for the endowment.

Jimmy S. Perryman manages interactions, including revenue and expense sharing among the city, developers, and the utility, and provides oversight to ensure proper property interactions for the Municipal Utility District 4 in Forney, Texas.

#### **Item 5 Additional Compensation**

James S. Perryman does not receive any economic benefits for providing advisory services from someone who is not a client of Perryman Financial Advisory, Inc other than what is disclosed in this form.

#### **Item 6 Supervision**

All new accounts undergo careful analysis and review of the appropriateness of the assets held and the asset allocation, and are compared to the investment objectives you stated. After an account has been approved for a specific investment program, the Chief Compliance Officer will monitor the trading activities in the account to ensure that the securities purchased or sold are consistent with your investment objectives.

The Chief Compliance Officer will review the activity in each account at least quarterly to determine if the account has been managed in a manner consistent with your investment objectives and shall discuss any questionable activities in any account with you. The Chief Compliance Officer will also look for any evidence of excessive trading or conflicts of interest between you and the portfolio manager.

Our Firm has established written policies and procedures that it will utilize to supervise. In addition, a Code of Ethics has been adopted, which we have agreed to follow and comply with.

The confidence and trust placed in our Firm and its employees is something we value and endeavor to protect.

The Supervisor for James S. Perryman is William D. Perryman, President. William D. Perryman can be reached at 972-770-4800 should you have any additional questions or concerns.

**Item 7**      **Requirements for State Registered Advisers**

Not applicable.

## Item 1 Cover Page: Debra A. Keitzer-Outlaw

Debra A. Keitzer-Outlaw  
12221 Merit Dr. Ste 1660  
Dallas, TX 75251  
972-770-4800  
CRD# 2901818

This brochure supplement provides information about Debra A. Keitzer-Outlaw that supplements the Perryman Financial Advisory, Inc. brochure. You should have received a copy of that brochure. Please contact William D. Perryman, President, if you did not receive Perryman Financial Advisory, Inc.'s brochure or if you have any questions about the contents of this supplement.

Additional information about Debra A. Keitzer-Outlaw is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

Dated: March 18, 2026

## Item 2 Educational Background and Business Experience

### Education History:

Debra Ann Keitzer-Outlaw, born 1956, attended the University of Texas in Austin, Texas and received her Master of Business Administration (MBA) degree. Debra also graduated from the University of Missouri in Columbia, Missouri, and received a Bachelor of Science in Business Administration (BSBA) degree.

### Professional Licenses:

Debra Ann Keitzer-Outlaw has a Certified Financial Planner ("CFP") professional designation.

The Certified Financial Planner™, CFP®, and federally registered CFP (with flame design) marks (collectively, the "CFP® marks") are professional certification marks granted in the United States by Certified Financial Planner Board of Standards, Inc. ("CFP Board").

The CFP® certification is a voluntary certification; no federal or state law or regulation requires financial planners to hold CFP® certification. It is recognized in the United States and a number of other countries for its (1) high standard of professional education; (2) stringent code of conduct and standards of practice; and (3) ethical requirements that govern professional engagements with clients. Currently, more than 62,000 individuals have obtained CFP® certification in the United States.

To attain the right to use the CFP® marks, an individual must satisfactorily fulfill the following requirements:

- Education – Complete an advanced college-level course of study addressing the financial planning subject areas that CFP Board's studies have determined as necessary for the competent and professional delivery of financial planning services, and attain a Bachelor's Degree from a regionally accredited United States college or university (or its equivalent from a foreign university). CFP Board's financial planning subject areas include insurance planning and risk management, employee benefits planning, investment planning, income tax planning, retirement planning, and estate planning.

- Examination – Pass the comprehensive CFP® Certification Examination. The examination, administered over 10 hours in a two-day period, includes case studies and client scenarios designed to test one's ability to accurately diagnose financial planning issues and apply one's knowledge to real-world circumstances.
- Experience – Complete at least three years of full-time financial planning-related experience (or the equivalent, measured as 2,000 hours per year); and
- Ethics – Agree to be bound by CFP Board's Standards of Professional Conduct, a set of documents outlining the ethical and practice standards for CFP® professionals. Individuals who become certified must complete the following ongoing education and ethics requirements to maintain the right to continue to use the CFP® marks:
  - Continuing Education – Complete 30 hours of continuing education every two years, including two hours on the Code of Ethics and other parts of the Standards of Professional Conduct, to maintain competence and keep up with developments in the financial planning field; and
  - Ethics – Renew an agreement to be bound by the Standards of Professional Conduct. The Standards prominently require that CFP® professionals provide financial planning services at a fiduciary standard of care. This means CFP® professionals must provide financial planning services in the best interests of their clients.

CFP® professionals who fail to comply with the above standards and requirements may be subject to the CFP Board's enforcement process, which could result in suspension or permanent revocation of their CFP® certification.

[Debra Ann Keitzer-Outlaw is a Certified Public Accountant \("CPA"\).](#) The Certified Public Accountant (CPA) designation is a credential that attests to your in-depth knowledge of accounting principles and practices, including applicable laws and regulations. Many holders of the CPA in private practice devote their time to preparing and filing tax returns, both business and individual, many members of the general public erroneously assume that this is the major focus of the profession.

Earning a CPA: You are required to pass an exam and fulfill continuing professional education (CPE) requirements. Most states have their own boards of accounting (also known as boards of accountancy) that regulate the profession and the awarding of the CPA license. Qualifying to practice in one state may not automatically allow you to practice in another.

Debra Ann Keitzer-Outlaw has a Certified in Long-Term Care (CLTC) designation granted by the Corporation For Long-Term Care Certification. This designation focuses on long-term care planning for middle-aged clients. Graduates complete a rigorous multidisciplinary course that focuses on the profession of long-term care.

All graduates of the Certified in Long-Term Care (CLTC) program are required by the independent CLTC Board of Standards, Inc. (Board) to renew their designation yearly, at which time they must show that they have maintained a minimum standard of competence. It is based on the principal that graduates can continue to serve their clients with the highest degree of professionalism only if kept informed on advances in planning techniques and changes in both the long-term care insurance market and regulatory bodies.

The Board has determined that this essential information is not currently available through continuing education programs. After a thorough review of the content available on the CLTC Graduate web

site (Site) the Board has determined that it provides the tools to meet the minimum standards to maintain competency.

The products, services, and information available on the website are supported only through renewal fees. The Board has determined that accepting funding from the insurance industry or referral fees from vendors would compromise the integrity of the CLTC designation.

The payment of an annual renewal fee demonstrates a commitment to continuing education by giving you access to the material necessary to meet the minimum standard of competence called for. Graduates who do not pay said fee have made a decision not to remain engaged in the profession at the level required by the Board and, therefore, will be considered to have voluntarily relinquished their CLTC designation, and if appropriate, notice of the same will be forwarded to that person's company.

Designees are required to sign and return the following Pledge:

1. I understand that acquiring the CLTC designation is the first step in a commitment to the profession of long - term care planning.
2. I understand that to serve my clients with the highest degree of professionalism I must stay informed on advances in planning techniques and changes in both the long-term care insurance market and regulatory bodies.
3. I understand that the CLTC Board of Standards has set minimum educational criteria for renewing the designation. I further understand that the materials and services that enable me to meet those criteria are available on the CLTC Graduate website. Failure to renew access to required CLTC education will act as a voluntary relinquishment of the CLTC designation.
4. I understand I am required by the CLTC Board of Standards, Inc. to successfully complete a CLTC Ethics course every two years to continue holding the CLTC Designation.
5. I hereby agree to abide by the terms of the CLTC Code of Professional Responsibility, including continued learning.

The CLTC designation, which is owned by the CLTC Board of Standards, Inc., is not affiliated with or funded by any insurance sales or marketing organization. The quality of the program is evidenced by the granting of continuing education credits by all states as well as established programs such as the Certified Financial Planner (CFP®) and Chartered Life Underwriter (CLU®) designations. It has also been approved in those states that have set strict criteria for professional designations.

[Debra Ann Keitzer-Outlaw has a General Lines, Life, Accident, Health, and HMO Insurance license.](#) The Insurance license allows her to sell health, dental, disability and traditional life insurance products. Insurance licenses are issued by all states. Each insurance department establishes the required qualifications for this license.

General Requirements:

- An individual applying for a Texas insurance license must be at least 18 years of age.
- Applicants are not required to be sponsored to pursue their license.
- Applicants must submit fingerprints as part of the license application.
- Texas has no pre-licensing education requirement unless a 90-day temporary license is desired. To obtain a 90-day temporary license, candidates must complete 40 hours of pre-licensing education.
- Candidates must apply for licensure within 12 months from receiving a passing grade on the examination.

## Business Background:

Employer	Start Date	End Date	Position
Perryman Financial Advisory, Inc.	April, 2000	Current	Adviser and Chief Financial Officer
Perryman Securities, Inc.	April, 2002	Current	Chief Financial Officer and Registered Representative

### Item 3 Disciplinary Information

Debra Ann Keitzer-Outlaw does not have any disciplinary information to disclose.

A full report that reflects the professional background, business practices, and conduct of our advisory agents is available through the Financial Industry Regulatory Authority's (FINRA) BrokerCheck system link at [www.finra.org/brokercheck](http://www.finra.org/brokercheck), or you may request disclosable information under BrokerCheck by calling (800) 289-9999, a toll-free hotline operated by FINRA.

You may also access a full report of our advisory agents through the IAPD link at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov). Should you have any technical difficulties with this link you can call 240-386-4848 for further assistance.

The information that appears on these websites is collected from individual investment adviser representatives, investment adviser firm(s), and/or securities regulator(s) as part of the securities industry's registration and licensing process.

### Item 4 Other Business Activities

Debra Ann Keitzer-Outlaw is also a registered representative of Perryman Securities, Inc. (Member FINRA/SIPC). In this capacity, she may sell securities through Perryman Securities, Inc. and receive normal and customary commissions as a result of such purchases and sales. This presents a conflict of interest to the extent that she recommends that you invest in a security, which results in a commission being paid to her.

Debra Ann Keitzer-Outlaw has a Group I Insurance license and provides insurance sales through Perryman Financial Advisory, Inc. Debra Ann Keitzer-Outlaw will seek out the products of any company, agency, or brokerage that may have products fitting our client's needs. Debra Ann Keitzer-Outlaw spends less than 5% of her time in insurance sales. Debra Ann Keitzer-Outlaw receives commissions based on the sales of these insurance products.

This presents a conflict of interest to the extent that she recommends the purchase of an insurance product, which results in a commission being paid to her as an insurance agent.

### Item 5 Additional Compensation

Debra Ann Keitzer-Outlaw does not receive any economic benefits for providing advisory services from someone who is not a client of Perryman Financial Advisory, Inc other than what is disclosed in this form.

### Item 6 Supervision

All new accounts undergo careful analysis and review as to appropriateness of assets held and asset allocation and compared to the investment objectives stated by you. After an account has been

approved for a specific investment program, the Chief Compliance Officer will monitor the trading activities in the account to ensure that the securities purchased or sold are consistent with your investment objectives.

The Chief Compliance Officer will review the activity in each account at least quarterly to determine if the account has been managed in a manner consistent with your investment objectives and shall discuss any questionable activities in any account with you. The Chief Compliance Officer will also look for any evidence of excessive trading or conflicts of interest between you and the portfolio manager.

Our Firm has established written policies and procedures that it will utilize to supervise. In addition, a Code of Ethics has been adopted, which we have agreed to follow and comply with.

The confidence and trust placed in our Firm and its employees is something we value and endeavor to protect.

The Supervisor for Debra Ann. Keitzer-Outlaw is William D. Perryman, President. William D. Perryman can be reached at 972-770-4800 should you have any additional questions or concerns.

#### **Item 7      Requirements for State Registered Advisers**

Not Applicable.

## Item 1 Cover Page: Jennifer V. Grant

Jennifer V. Grant  
12221 Merit Dr. Ste 1660  
Dallas, TX 75251  
972-770-4800  
CRD# 6677103

This brochure supplement provides information about Jennifer V. Grant that supplements the Perryman Financial Advisory, Inc. brochure. You should have received a copy of that brochure. Please contact William D. Perryman, President, if you did not receive Perryman Financial Advisory, Inc.'s brochure or if you have any questions about the contents of this supplement.

Additional information about Jennifer V. Grant is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

Dated: March 18, 2026

## Item 2 Educational Background and Business Experience

### Education History:

Jennifer V. Grant, born 1971, attended Centenary College of Louisiana, where she received her Bachelor of Chemistry. She later attended the University of Texas at Austin, receiving her Master of Chemistry, and the University of Texas at Dallas, where she received her MBA.

### Professional Licenses:

Jennifer V. Grant has a Certified Financial Planner ("CFP") professional designation. The Certified Financial Planner™, CFP® and federally registered CFP (with flame design) marks (collectively, the "CFP® marks") are professional certification marks granted in the United States by Certified Financial Planner Board of Standards, Inc. ("CFP Board").

The CFP® certification is a voluntary certification; no federal or state law or regulation requires financial planners to hold CFP® certification. It is recognized in the United States and a number of other countries for its (1) high standard of professional education; (2) stringent code of conduct and standards of practice; and (3) ethical requirements that govern professional engagements with clients. Currently, more than 62,000 individuals have obtained CFP® certification in the United States.

To attain the right to use the CFP® marks, an individual must satisfactorily fulfill the following requirements:

- Education – Complete an advanced college-level course of study addressing the financial planning subject areas that CFP Board's studies have determined as necessary for the competent and professional delivery of financial planning services, and attain a Bachelor's Degree from a regionally accredited United States college or university (or its equivalent from a foreign university). CFP Board's financial planning subject areas include insurance planning and risk management, employee benefits planning, investment planning, income tax planning, retirement planning, and estate planning;
- Examination – Pass the comprehensive CFP® Certification Examination. The examination, administered in 10 hours over a two-day period, includes case studies and client scenarios designed

to test one's ability to correctly diagnose financial planning issues and apply one's knowledge of financial planning to real-world circumstances.

- Experience – Complete at least three years of full-time financial planning-related experience (or the equivalent, measured as 2,000 hours per year).
- Ethics – Agree to be bound by CFP Board's Standards of Professional Conduct, a set of documents outlining the ethical and practice standards for CFP® professionals.

Individuals who become certified must complete the following ongoing education and ethics requirements to maintain the right to continue to use the CFP® marks:

- Continuing Education – Complete 30 hours of continuing education every two years, including two hours on the Code of Ethics and other parts of the Standards of Professional Conduct, to maintain competence and keep up with developments in the financial planning field; and
- Ethics – Renew an agreement to be bound by the Standards of Professional Conduct. The Standards prominently require that CFP® professionals provide financial planning services at a fiduciary standard of care. This means CFP® professionals must provide financial planning services in the best interests of their clients.

CFP® professionals who fail to comply with the above standards and requirements may be subject to the CFP Board's enforcement process, which could result in suspension or permanent revocation of their CFP® certification.

Jennifer Grant has a General Lines, Life, Accident, Health, and HMO Insurance license. The Insurance license allows her to sell health, dental, disability and traditional life insurance products. Insurance licenses are issued by all states. Each insurance department establishes the required qualifications for this license.

#### General Requirements:

- An individual applying for a Texas insurance license must be at least 18 years of age.
- Applicants are not required to be sponsored to pursue their license.
- Applicants must submit fingerprints as part of the license application.
- Texas has no pre-licensing education requirement unless a 90-day temporary license is desired. To obtain a 90-day temporary license, candidates must complete 40 hours of pre-licensing education.
- Candidates must apply for licensure within 12 months from receiving a passing grade on the examination.

Jennifer Grant has obtained a Long-Term Care Partnership certification, which involves specialized training in long-term care insurance and planning strategies, including long-term care insurance and state partnership programs that allow individuals to protect certain assets while qualifying for Medicaid, subject to applicable state rules. This certification does not constitute a professional license.

#### Business Background:

<b>Employer</b>	<b>Start Date</b>	<b>End Date</b>	<b>Position</b>
<b>Perryman Financial Advisory, Inc.</b>	September, 2017	Current	Assistant Compliance Officer and Investment Adviser Agent
<b>Perryman Securities, Inc.</b>	September, 2017	Current	Assistant Compliance Officer and Registered Representative

<b>Financial Gravity Wealth Inc. f/k/a Pollock Advisory Group</b>	July, 2016	August, 2017	Investment Adviser Agent
<b>Grant Associates Consulting</b>	June, 2016	August, 2017	Self Employed
<b>Pollock Advisory Group, Inc. AZZ</b>	June, 2016	July, 2016	Investment Adviser
	February, 2015	May, 2016	Business Unit Manager
<b>Vincent Enterprises</b>	April, 2004	February, 2015	Vice President of Finance

### Item 3 Disciplinary Information

Jennifer V. Grant does not have any disciplinary information to disclose.

A full report that reflects the professional background, business practices, and conduct of our advisory agents is available through the Financial Industry Regulatory Authority's (FINRA) BrokerCheck system link at [www.finra.org/brokercheck](http://www.finra.org/brokercheck), or you may request disclosable information under BrokerCheck by calling (800) 289-9999, a toll-free hotline operated by FINRA.

You may also access a full report of our advisory agents through the IAPD link at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov). Should you have any technical difficulties with this link, you can call 240-386-4848 for further assistance.

The information that appears on these websites is collected from individual investment adviser representatives, investment adviser firm(s), and/or securities regulator(s) as part of the securities industry's registration and licensing process.

### Item 4 Other Business Activities

Jennifer V. Grant is also a registered representative of Perryman Securities, Inc. (Member FINRA/SIPC). In this capacity, she may sell securities through Perryman Securities, Inc. and receive normal and customary commissions as a result of such purchases and sales. This presents a conflict of interest to the extent that she recommends you invest in a security, resulting in a commission being paid to her.

Jennifer V. Grant has a Group I Insurance license and provides insurance sales through Perryman Financial Advisory, Inc. Jennifer V. Grant will seek out the products of any company, agency or brokerage that may have products fitting our client's needs. Jennifer V. Grant spends less than 5% of her time in insurance sales. Jennifer V. Grant receives commissions based on the sales of these insurance products. This presents a conflict of interest to the extent that she recommends the purchase of an insurance product, which results in a commission being paid to her as an insurance agent.

Jennifer V. Grant is co-owner of Grant Associates Consulting LLC dba What the Fit, a family fitness camp business. There are no material conflicts of interest between Perryman Financial Advisory and Grant Associates Consulting LLC.

Jennifer V. Grant is a director of The Ark House, a foundation that provides low-cost housing to patients traveling to Dallas, TX, for medical care, where she oversees the budget for The Ark House and the portfolio for The Ark House Foundation. There are no material conflicts of interest between Perryman Financial Advisory and The Ark House.

#### **Item 5 Additional Compensation**

Jennifer V. Grant does not receive any economic benefits for providing advisory services from someone who is not a client of Perryman Financial Advisory, Inc. other than what is disclosed in this form.

#### **Item 6 Supervision**

All new accounts undergo careful analysis and review as to appropriateness of assets held and asset allocation, and are compared to the investment objectives stated by you. After an account has been approved for a specific investment program, the Chief Compliance Officer will monitor the trading activities in the account to ensure that the securities purchased or sold are consistent with your investment objectives. The Chief Compliance Officer will review the activity in each account at least quarterly to determine if the account has been managed in a manner consistent with your investment objectives and shall discuss any questionable activities in any account with you. The Chief Compliance Officer will also look for any evidence of excessive trading or conflicts of interest between the portfolio manager and you.

Our Firm has established written policies and procedures that it will utilize to supervise. In addition, a Code of Ethics has been adopted, which we have agreed to follow and comply with.

The confidence and trust placed in our Firm and its employees is something we value and endeavor to protect. The Supervisor for Jennifer V. Grant is William D. Perryman, President. William D. Perryman can be reached at 972-770-4800 should you have any additional questions or concerns.

#### **Item 7 Requirements for State Registered Advisers**

Not Applicable

## Item 1 Cover Page: Ami Baxter

Ami Baxter  
12221 Merit Dr. Ste 1660  
Dallas, TX 75251  
972-770-4800  
CRD# 7177635

This brochure supplement provides information about Ami Baxter that supplements the Perryman Financial Advisory, Inc. brochure. You should have received a copy of that brochure. Please contact William D. Perryman, President, if you did not receive Perryman Financial Advisory, Inc.'s brochure or if you have any questions about the contents of this supplement.

Additional information about Ami Baxter is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

Dated: March 18, 2026

## Item 2 Educational Background and Business Experience

### Education History:

Ami Baxter, born in 1976, attended Southern Methodist University, where she received her Bachelor of Arts in Advertising.

### Professional Licenses:

Ami Baxter has a Certified Financial Planner ("CFP") professional designation. The Certified Financial Planner™, CFP® and federally registered CFP (with flame design) marks (collectively, the "CFP® marks") are professional certification marks granted in the United States by Certified Financial Planner Board of Standards, Inc. ("CFP Board").

The CFP® certification is a voluntary certification; no federal or state law or regulation requires financial planners to hold CFP® certification. It is recognized in the United States and a number of other countries for its (1) high standard of professional education; (2) stringent code of conduct and standards of practice; and (3) ethical requirements that govern professional engagements with clients. Currently, more than 62,000 individuals have obtained CFP® certification in the United States.

To attain the right to use the CFP® marks, an individual must satisfactorily fulfill the following requirements:

- Education – Complete an advanced college-level course of study addressing the financial planning subject areas that CFP Board's studies have determined as necessary for the competent and professional delivery of financial planning services, and attain a Bachelor's Degree from a regionally accredited United States college or university (or its equivalent from a foreign university). CFP Board's financial planning subject areas include insurance planning and risk management, employee benefits planning, investment planning, income tax planning, retirement planning, and estate planning.
- Examination – Pass the comprehensive CFP® Certification Examination. The examination, administered in 10 hours over a two-day period, includes case studies and client scenarios designed to test one's ability to correctly diagnose financial planning issues and apply one's knowledge of financial planning to real-world circumstances.

- Experience – Complete at least three years of full-time financial planning-related experience (or the equivalent, measured as 2,000 hours per year); and
- Ethics – Agree to be bound by CFP Board's Standards of Professional Conduct, a set of documents outlining the ethical and practice standards for CFP® professionals.

Individuals who become certified must complete the following ongoing education and ethics requirements to maintain the right to continue to use the CFP® marks:

- Continuing Education – Complete 30 hours of continuing education every two years, including two hours on the Code of Ethics and other parts of the Standards of Professional Conduct, to maintain competence and keep up with developments in the financial planning field; and
- Ethics – Renew an agreement to be bound by the Standards of Professional Conduct. The Standards prominently require that CFP® professionals provide financial planning services at a fiduciary standard of care. This means CFP® professionals must provide financial planning services in the best interests of their clients.

CFP® professionals who fail to comply with the above standards and requirements may be subject to CFP Board's enforcement process, which could result in suspension or permanent revocation of their CFP® certification.

#### Business Background:

Employer	Start Date	End Date	Position
<b>Perryman Financial Advisory, Inc.</b>	September, 2019	Current	Investment Adviser Agent
<b>Perryman Securities, Inc.</b>	September, 2019	Current	Registered Representative
<b>Kantar Media</b>	October, 2016	September 2019	Account Manager
<b>AMI Media Services</b>	February, 2005	September, 2016	Director of Media Operations

#### Item 3 Disciplinary Information

Ami Baxter does not have any disciplinary information to disclose.

A full report that reflects the professional background, business practices, and conduct of our advisory agents is available through the Financial Industry Regulatory Authority's (FINRA) BrokerCheck system link at [www.finra.org/brokercheck](http://www.finra.org/brokercheck), or you may request disclosable information under BrokerCheck by calling (800) 289-9999, a toll-free hotline operated by FINRA.

You may also access a full report of our advisory agents through the IAPD link at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov). Should you have any technical difficulties with this link, you can call 240-386-4848 for further assistance.

The information that appears on these websites is collected from individual investment adviser representatives, investment adviser firm(s), and/or securities regulator(s) as part of the securities industry's registration and licensing process.

#### Item 4 Other Business Activities

Ami Baxter is also a registered representative of Perryman Securities, Inc. (Member FINRA/SIPC). In this capacity, she may sell securities through Perryman Securities, Inc. and receive normal and customary

commissions as a result of such purchases and sales. This presents a conflict of interest to the extent that she recommends that you invest in a security, which results in a commission being paid to her.

#### **Item 5 Additional Compensation**

Ami Baxter does not receive any economic benefits for providing advisory services from someone who is not a client of Perryman Financial Advisory, Inc., other than what is disclosed in this form.

#### **Item 6 Supervision**

All new accounts undergo careful analysis and review as to appropriateness of assets held and asset allocation and compared to the investment objectives stated by you. After an account has been approved for a specific investment program, the Chief Compliance Officer will monitor the trading activities in the account to ensure that the securities purchased or sold are consistent with your investment objectives. The Chief Compliance Officer will review the activity in each account at least quarterly to determine if the account has been managed in a manner consistent with your investment objectives and shall discuss any questionable activities in any account with you. The Chief Compliance Officer will also look for any evidence of excessive trading or conflicts of interest between you and the portfolio manager.

Our Firm has established written policies and procedures that it will utilize to supervise. In addition, a Code of Ethics has been adopted, which we have agreed to follow and comply with.

The confidence and trust placed in our Firm and its employees is something we value and endeavor to protect. The Supervisor for Ami Baxter is William D. Perryman, President. William D. Perryman can be reached at 972-770-4800 should you have any additional questions or concerns.

#### **Item 7 Requirements for State Registered Advisers**

Not Applicable

## Item 1 Cover Page: Lynn David Hebert

Lynn D. Hebert  
12221 Merit Dr. Ste 1660  
Dallas, TX 75251  
972-770-4800  
CRD# 7408217

This brochure supplement provides information about Ami Baxter that supplements the Perryman Financial Advisory, Inc. brochure. You should have received a copy of that brochure. Please contact William D. Perryman, President, if you did not receive Perryman Financial Advisory, Inc.'s brochure or if you have any questions about the contents of this supplement.

Additional information about Lynn D. Hebert is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

Dated: March 18, 2026

## Item 2 Educational Background and Business Experience

### Education History:

Lynn D. Hebert, born in 1988, attended Baylor University, where he received his Bachelor of Science degree in Education.

### Professional Licenses:

Lynn D. Hebert has a Certified Financial Planner ("CFP") professional designation. The Certified Financial Planner™, CFP® and federally registered CFP (with flame design) marks (collectively, the "CFP® marks") are professional certification marks granted in the United States by Certified Financial Planner Board of Standards, Inc. ("CFP Board").

The CFP® certification is a voluntary certification; no federal or state law or regulation requires financial planners to hold CFP® certification. It is recognized in the United States and a number of other countries for its (1) high standard of professional education; (2) stringent code of conduct and standards of practice; and (3) ethical requirements that govern professional engagements with clients. Currently, more than 62,000 individuals have obtained CFP® certification in the United States.

To attain the right to use the CFP® marks, an individual must satisfactorily fulfill the following requirements:

- Education – Complete an advanced college-level course of study addressing the financial planning subject areas that CFP Board's studies have determined as necessary for the competent and professional delivery of financial planning services and attain a Bachelor's Degree from a regionally accredited United States college or university (or its equivalent from a foreign university). CFP Board's financial planning subject areas include insurance planning and risk management, employee benefits planning, investment planning, income tax planning, retirement planning, and estate planning.
- Examination – Pass the comprehensive CFP® Certification Examination. The examination, administered in 10 hours over a two-day period, includes case studies and client scenarios designed

to test one's ability to correctly diagnose financial planning issues and apply one's knowledge of financial planning to real-world circumstances.

- Experience – Complete at least three years of full-time financial planning-related experience (or the equivalent, measured as 2,000 hours per year); and
- Ethics – Agree to be bound by CFP Board's Standards of Professional Conduct, a set of documents outlining the ethical and practice standards for CFP® professionals.

Individuals who become certified must complete the following ongoing education and ethics requirements to maintain the right to continue to use the CFP® marks:

- Continuing Education – Complete 30 hours of continuing education hours every two years, including two hours on the Code of Ethics and other parts of the Standards of Professional Conduct, to maintain competence and keep up with developments in the financial planning field; and
- Ethics – Renew an agreement to be bound by the Standards of Professional Conduct. The Standards prominently require that CFP® professionals provide financial planning services at a fiduciary standard of care. This means CFP® professionals must provide financial planning services in the best interests of their clients.

CFP® professionals who fail to comply with the above standards and requirements may be subject to CFP Board's enforcement process, which could result in suspension or permanent revocation of their CFP® certification.

#### Business Background:

Employer	Start Date	End Date	Position
<b>Perryman Financial Advisory, Inc.</b>	June, 2021	Current	Investment Adviser Agent
<b>Perryman Securities, Inc.</b>	June, 2021	Current	Non-registered representative
<b>Lufkin ISD</b>	August, 2013	May, 2011	Teacher
<b>Apple Springs ISD</b>	August, 2011	June, 2013	Teacher

#### Item 3 Disciplinary Information

Lynn D. Hebert has no disciplinary information to disclose.

A full report that reflects the professional background, business practices, and conduct of our advisory agents is available through the Financial Industry Regulatory Authority's (FINRA) BrokerCheck system link at [www.finra.org/brokercheck](http://www.finra.org/brokercheck), or you may request disclosable information under BrokerCheck by calling (800) 289-9999, a toll-free hotline operated by FINRA.

You may also access a full report of our advisory agents through the IAPD link at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov). Should you have any technical difficulties with this link, you can call 240-386-4848 for further assistance.

The information that appears on these websites is collected from individual investment adviser representatives, investment adviser firm(s), and/or securities regulator(s) as part of the securities industry's registration and licensing process.

#### Item 4 Other Business Activities

Lynn D. Hebert is also a non-registered representative of Perryman Securities, Inc. (Member FINRA/SIPC). No compensation is received from Perryman Securities, Inc.

**Item 5 Additional Compensation**

Lynn D. Hebert does not receive any economic benefits for providing advisory services from someone who is not a client of Perryman Financial Advisory, Inc., other than what is disclosed in this form.

**Item 6 Supervision**

All new accounts undergo careful analysis and review of the appropriateness of the assets held and the asset allocation, and are compared to the investment objectives you stated. After an account has been approved for a specific investment program, the Chief Compliance Officer will monitor the trading activities in the account to ensure that the securities purchased or sold are consistent with your investment objectives. The Chief Compliance Officer will review the activity in each account at least quarterly to determine if the account has been managed in a manner consistent with your investment objectives and shall discuss any questionable activities in any account with you. The Chief Compliance Officer will also look for any evidence of excessive trading or conflicts of interest between the portfolio manager and you.

Our Firm has established written policies and procedures that it will utilize to supervise. In addition, a Code of Ethics has been adopted, which we have agreed to follow and comply with.

The confidence and trust placed in our Firm and its employees is something we value and endeavor to protect. The Supervisor for Lynn D. Hebert is William D. Perryman, President. William D. Perryman can be reached at 972-770-4800 should you have any additional questions or concerns.

**Item 7 Requirements for State Registered Advisers**

Not Applicable